



## Fact Sheet: 2008 Filing Season CalFile

### ❑ What is CalFile?

- CalFile is FTB's secure, free, direct, online program for taxpayers to complete and e-file their personal income tax returns.

### ❑ What's new this year?

- **Spanish CalFile:** This year CalFile is available in Spanish. It performs exactly as the English version; however, all text is in Spanish.
- Taxpayers no longer need a Customer Service Number (CSN) to use CalFile. They only need their social security number and their last name to access the program. This also applies to Web Pay and the Electronic Installment Agreement applications.

### ❑ Who is eligible to use CalFile?

- CalFile is available to more than 6 million taxpayers. CalFile accepts income of up to \$310,000, itemized deductions, and some tax credits. Taxpayers must meet the following criteria to be eligible for CalFile:
  - File using any filing status.
  - California resident for the entire year.
  - Filing an original tax return for the current tax year.
  - Claim up to 5 dependents.
  - Have a federal AGI up to:
    - \$155,416 for single and married/registered domestic partnership (RDP) filing separately.
    - \$233,129 for head of household.
    - \$310,837 for married/RDP filing jointly and qualifying widow(er).

### ❑ What are the benefits of CalFile?

- CalFile is a free, easy, direct-to-government e-filing option. Taxpayers receive an instant confirmation from FTB that we have received their returns. Most people can complete their returns within 15-30 minutes. Refunds are generally deposited within 7 days, if the taxpayer chooses direct deposit. If the taxpayer owes money, they can pay online and schedule the payment date.

- CalFile is available in Spanish.

□ **Volume of CalFile returns received by process year**

- 2003 - 13,650 (Deployed April 13, 2003)
- 2004 - 109,650
- 2005 - 158,350
- 2006 - 111,500
- 2007 - 141,850
- 2008 - 159,000 (Projection: 12% increase over PY 2007)

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